

## Commission to Plan for the Future of University Development at Fresno State University

### Draft Work Plan, April – August, 2011

#### To be completed during April for reporting in the May Commission meeting:

1. Prepare brief (1 page) history of private fundraising at Fresno State. *(Peter Smits has already prepared this as part of his presentation.)*
2. Prepare statistical comparisons with peer and aspirational universities. See list of schools below. *(Barnes & Roche will prepare)*
3. “Realities” of the development world (Ex. 60% of estate gifts come as complete surprises to the non-profit beneficiaries) *(Barnes & Roche will compose this listing of 5-8 items.)*
4. What lessons can be learned from the Campaign for Fresno State, including from campaign volunteer leadership, to inform planning for the future? *(To be undertaken by University staff, Commission members, Campaign leadership and key donors with Bill Covino’s leadership.)*

#### To be completed during May for reporting in the June Commission meeting:

1. Best practices identified in peer and aspirant universities? *(Compiled by Barnes & Roche.)*
  - Recommendations for *securing* the development effort
  - Recommendations for *elevating* the development effort
  - How can Fresno State best engage volunteer efforts in the development program? *(Interview campaign leadership to determine how effectively they believe they have been utilized.)*
2. How can development program effectiveness best be evidenced and evaluated?
  - Recommendations for metrics for programmatic evaluation *(provided by Barnes & Roche)*
3. What level of priority should Fresno State assign to private fundraising? *(Make the case)*  
*(Created by a sub-committee of Commissioners with guidance by Bill Covino or Bill Massey)*

#### To be completed during June for reporting in the July Commission meeting:

1. How should development be funded at Fresno State? *(Created by a sub-committee of Commissioners with information about peer and aspirant universities provided by Barnes & Roche.)*
2. Recommend a University-wide development model for Fresno State. Are there instances where a centralized model is preferable to a decentralized model, such as annual fund and planned giving? What advancement services should be maintained, enhanced, streamlined, consolidated based on their centrality to the success of the development mission? Is there evidence that the current working model is ineffective? *(Recommendations provided by Barnes & Roche.)*
3. Suggest a timeline for implementing recommendations of the Commission that are accepted by the President. What can be implemented during John Welty's tenure? *(Barnes & Roche will work with Bill Covino and Peter Smits on this part.)*

To be completed during July for reporting in August Commission meeting:

1. Commission Report presented orally to President Welty *(Barnes & Roche will draft the report for sharing as appropriate.)*
2. Final revisions, additions, improvements to Commission Report to President Welty. Final report sent to President Welty.

**Barnes & Roche will produce statistical research and report qualitative results of individual campus surveys or interviews with each of the following institutions:**

Peer universities defined by the CSU system as:

Cal State Long Beach  
Cal Poly SLO  
San Diego State  
UNLV  
Utah State  
Boise State  
Univ. Wisconsin - Milwaukee  
Colorado State

Aspirant institutions:

Oregon State  
University of Central Florida (aspiring comprehensive)  
University of Texas - San Antonio (aspiring comprehensive)  
University of New Mexico  
Ball State University

